

OLIVIA CLARE PRESENTS

# CRM Education Help Sheets

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## **Working with Groups**

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CRM Education produce help sheets, best practice documentation and bespoke courseware specifically for our clients. We try to ensure our CRM Users always enjoy a straight forward and easy CRM experience.

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## Working with groups in ACT!

### Background

There are two types of group structures in ACT! Static and Dynamic. Static groups are extremely useful if your target audience is a defined pick list of people cherry picked from your database, perhaps even with nothing in common other than that you want to randomly select them before inviting them to a seminar or event. Dynamic groups work completely differently, these groups automatically populate using an advanced find based on a field search criteria. The following documentation takes you through the process of Group creation and gives best practice tips throughout each topic.

**Trainers Best Practice Tip:** It is important to note that whenever you create groups, and consequently sub groups, the structure can get quite detailed, we will always advise you to keep the naming convention of the main group as the first part of any subgroups relating to it. It is therefore important that you keep naming conventions short and consistent with each other.

### Static groups and when to use them

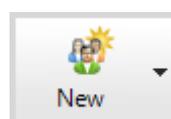
Static groups are most commonly used if you are arranging a seminar or similar event and want to cherry pick contacts randomly from your database there may be absolutely no common denominator that holds them together at all. You have the ability to either pick the contacts first, before you actually create the group that will hold them, or if preferred you can create an empty group and then let your Account Managers populate them for you as and when they find a contact that fits the group criteria.

### Creating an empty static group

To create an empty group that you would like to either populate yourself at a later date, or simply create for your sales team to populate as they are working, firstly click on the Group tab on the left hand side of the main contact screen:



Right click in the top half of the screen and locate the New Group option and select it. Alternatively select the new group icon from the top icon menu:



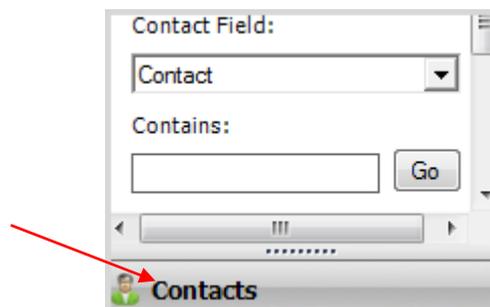
This will activate a new group on the left hand side of the screen, and allow you to enter a new group name in the top right pane. Make sure the group name is consistent with your company CRM policies on group creation.

**Trainers Best Practice Tip:** Make sure that you name the group something meaningful, you will probably keep them long term and need to reference them later. Also take a look at how many groups in the database are named already and keep a consistency across the CRM system. If necessary also enter a description of why members are in the group if this will also be useful to you later.

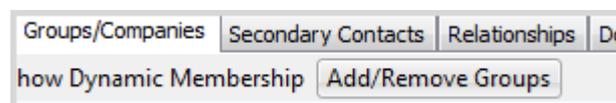
<b>Group</b>	
<b>Group Name</b>	<input type="text" value="Name of Group Here"/>
<b>Description</b>	<input type="text" value="Description of group membership criteria here if you have one"/>

### Populating a group manually one record at a time

Once the group is created it is ready to populate, return to the main contact screen by selecting the contacts tab on the left of the screen:

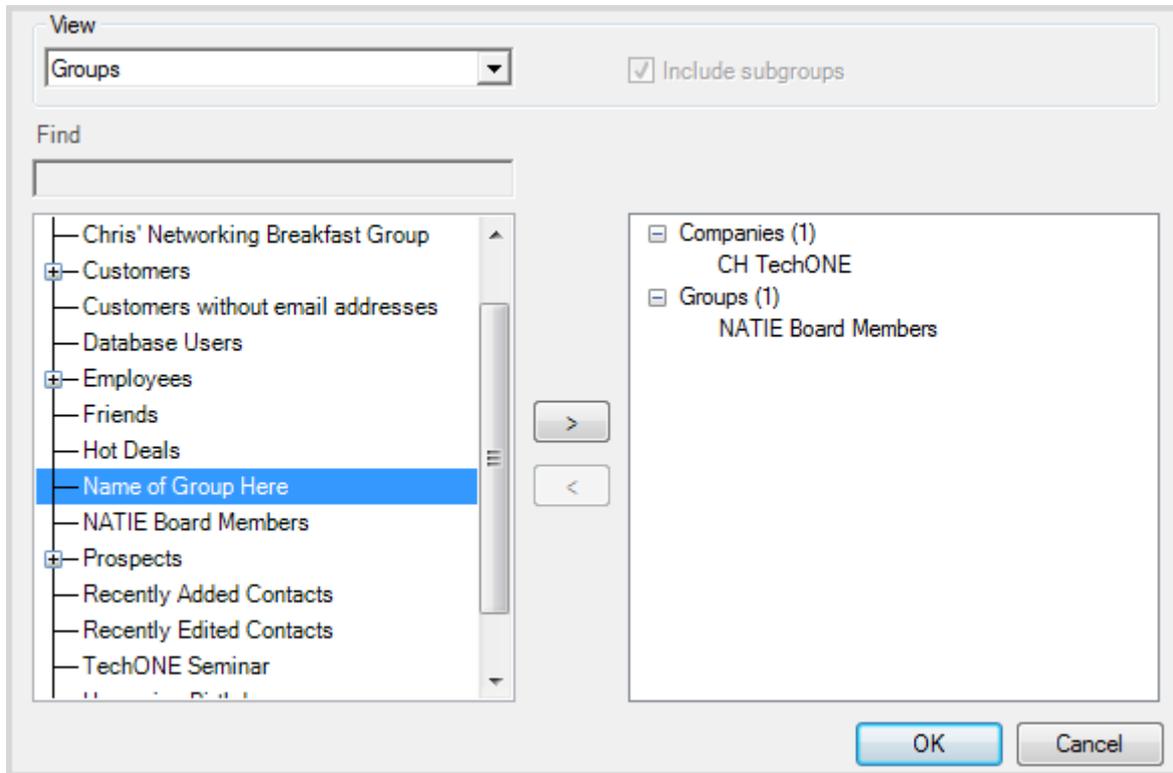


Next, using a Search option, locate the contact that you wish to add to your group so that they are active on the contact screen. Then click on the Group/Companies tab in the middle of the screen:



Select the **Add/Remove Groups** option to activate the following screen and highlight your group in the left hand pane. It is important to note that any group names in the right hand pane are groups that the contact is currently a member of. Any group names in the left hand pane are groups that are available to add your contact as a new member of:

Select the name of the group you wish to add on the left and use the arrow between the two panels to move the group to the right hand pane. Say Ok and the contact will populate into the group. Once you are happy with your group alignment, click ok to finish.



Once you select Ok, the group pane will look something like the diagram below. It is now easy to see at any time which groups the contact has been added to as a member:

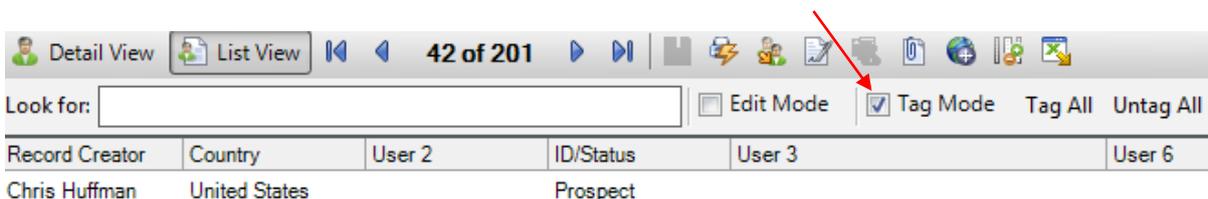
Group Name	Group Description	Record Manager
Name of Group Here	Description of group membership criteria here if you have one	Chris Huffman
NATIE Board Members	Static- National Association of Technical Importers/Exporters	Chris Huffman

### Deleting a contact from a group

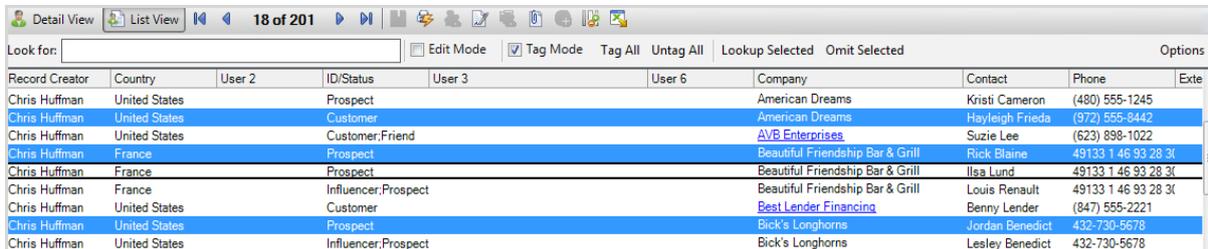
To take a contact out of a group, simply reverse the process above, highlight the group name in the right hand pane and select the arrow facing to the left to remove the contact from the group.

### Populating a group from a pick list

There may be some occasions when you want to use the contact list view as a pick list, and then quickly populate the group you have created with these pre-selected contacts. Before you start, make sure that you have collated the contacts first by tagging them in the contact list view. Click on the contact list view on the left hand pane, ensure that the tab mode button is ticked:

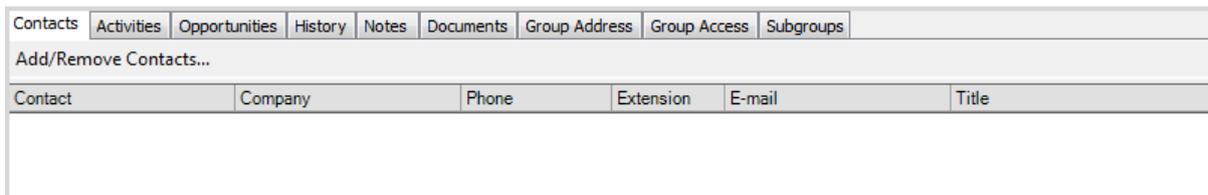


Work through your contacts and click the ones that you are going to make members of your group, as you tag (select) the contacts they will turn blue within the list:



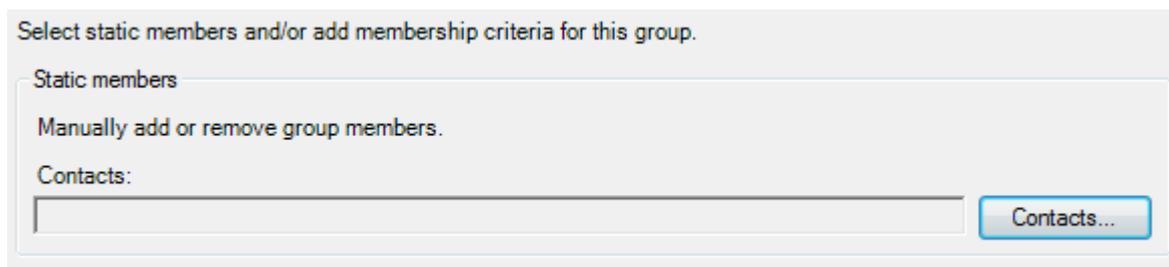
Record Creator	Country	User 2	ID/Status	User 3	User 6	Company	Contact	Phone	Ext
Chris Huffman	United States		Prospect			American Dreams	Kristi Cameron	(480) 555-1245	
Chris Huffman	United States		Customer			American Dreams	Hayleigh Frieda	(972) 555-8442	
Chris Huffman	United States		Customer/Friend			AVB Enterprises	Suzie Lee	(623) 898-1022	
Chris Huffman	France		Prospect			Beautiful Friendship Bar & Grill	Rick Blaine	49133 1 46 93 28 3f	
Chris Huffman	France		Prospect			Beautiful Friendship Bar & Grill	Ilsa Lund	49133 1 46 93 28 3f	
Chris Huffman	France		Influencer/Prospect			Beautiful Friendship Bar & Grill	Louis Renault	49133 1 46 93 28 3f	
Chris Huffman	United States		Customer			Best Lender Financing	Benny Lender	(847) 555-2221	
Chris Huffman	United States		Prospect			Bick's Longhorns	Jordan Benedict	432-730-5678	
Chris Huffman	United States		Influencer/Prospect			Bick's Longhorns	Lesley Benedict	432-730-5678	

Once you have the relevant contacts selected, click the Lookup selected option and the view will decrease in the number of contacts displayed to just the ones you have tagged. Check that the selection is right and then create a new group in exactly the same way as we have described in the previous chapter. This time however you are going to populate the group with your Lookup, make sure that the contact tab is active as displayed below, if this is a new group there will be no contacts currently listed:

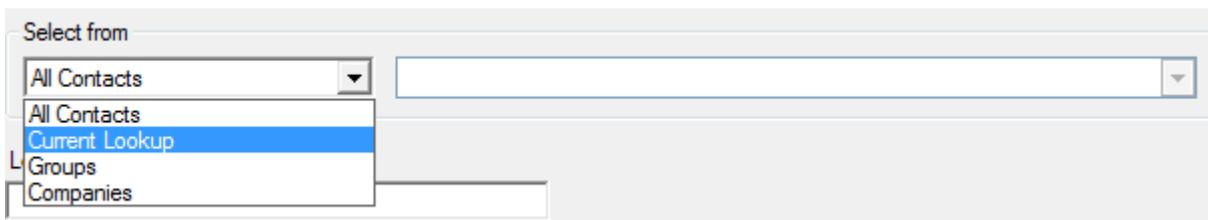


Contact	Company	Phone	Extension	E-mail	Title

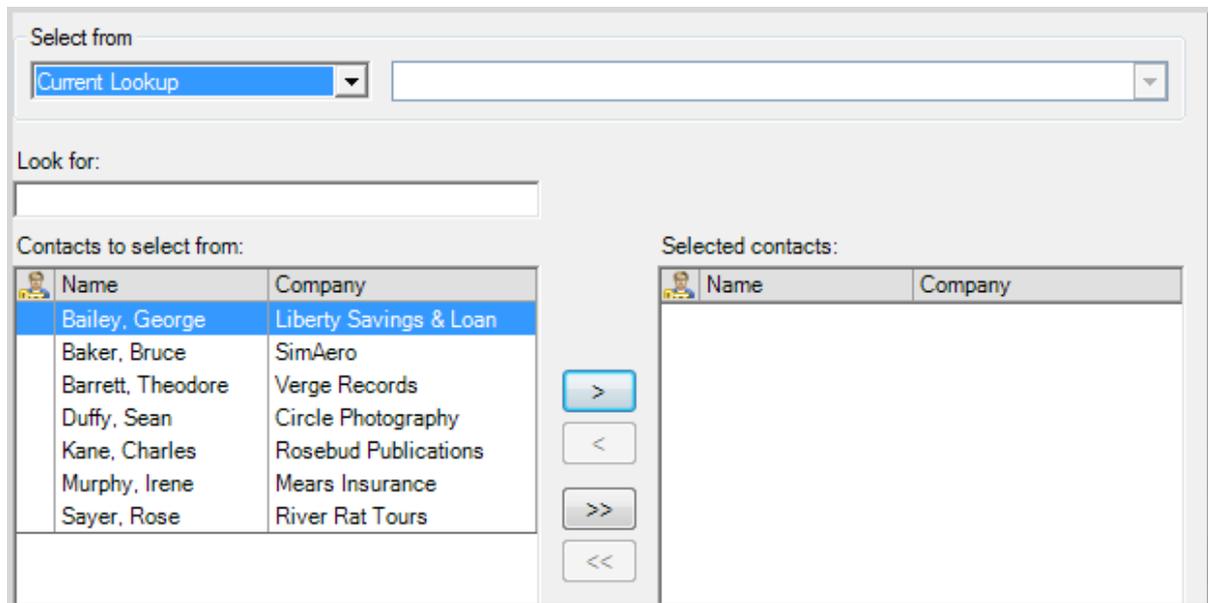
Select the **Add/Remove** contacts button to activate the following screen, in the case of a manual group we are going to use the first option: Select static members and manually add or remove group members, when the screen is active click on the Contacts icon at the end of the Contacts field:



You now have the opportunity to add the contacts that you have pre-selected to the group. Use the drop down listing underneath the Select from option and choose **Current Lookup**:



The box underneath headed “contacts to select from” will now only include the Lookup of record cards that you selected. Use the double arrow to move them from the left to the right pane, once they are over on the right, select Ok and your contacts will populate your group:



Contacts to select from:		Selected contacts:	
Name	Company	Name	Company
Bailey, George	Liberty Savings & Loan		
Baker, Bruce	SimAero		
Barrett, Theodore	Verge Records		
Duffy, Sean	Circle Photography		
Kane, Charles	Rosebud Publications		
Murphy, Irene	Mears Insurance		
Sayer, Rose	River Rat Tours		

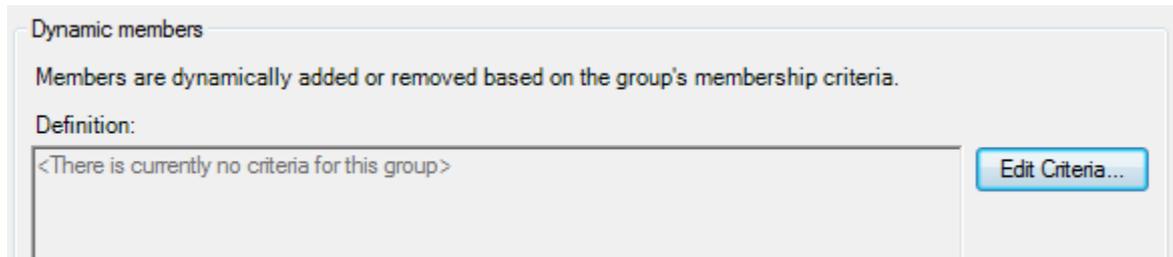
**Trainers best practice tip:** You can use this same method to add additional contacts to the group at a later date. It will not duplicate the contacts already in the group if you try and add them again.

### Working with dynamic groups

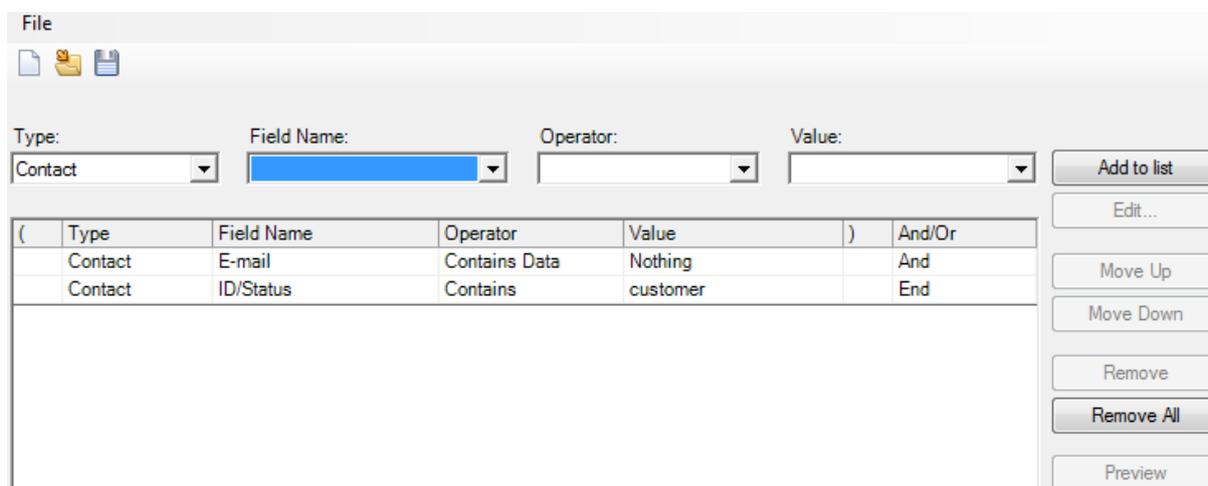
Dynamic groups self-populate based on an advanced search this advanced search is built within the group itself. As long as your users are entering data correctly in the fields actually used in the advanced search criteria, then your group will automatically pick up and drop contacts in and out of the groups based on the search criteria itself. Dynamic groups are a very powerful functionality in ACT! and they should be used to set the main campaign segmentation of your data before you start any marketing activity.

### Creating a dynamic group

To create a dynamic group, follow the exact same procedure as outlined above to create a base group, this time there is no need to use a pick list to find the data to populate it first. Once the group is created, select the Add/Remove contacts button to activate the group membership screen, this time we are going to use the dynamic member's option, select the Edit Criteria option at the end of the definition box, if your group already has a dynamic criteria it will appear already in the main grey box:



On selection the following dialogue box will activate, if you are searching the contact area use Contact as the type, next choose the field name containing your value, then the operator field to select the operator you need to use ie: starts with or contains and then finally the value, if the field has a drop down list then the values of the drop down list will be available to select from:

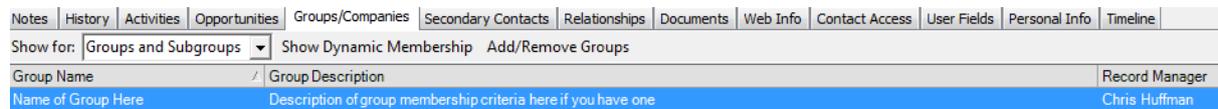


Once you are happy with the query itself, select the preview box. Note that any fields that have been used in the advanced search will automatically appear as columns in the preview results so that you can see whether the result is correct. Once you have set the criteria and are happy with the result select Ok and the group will populate based on any record cards with data values that match the search criteria set.

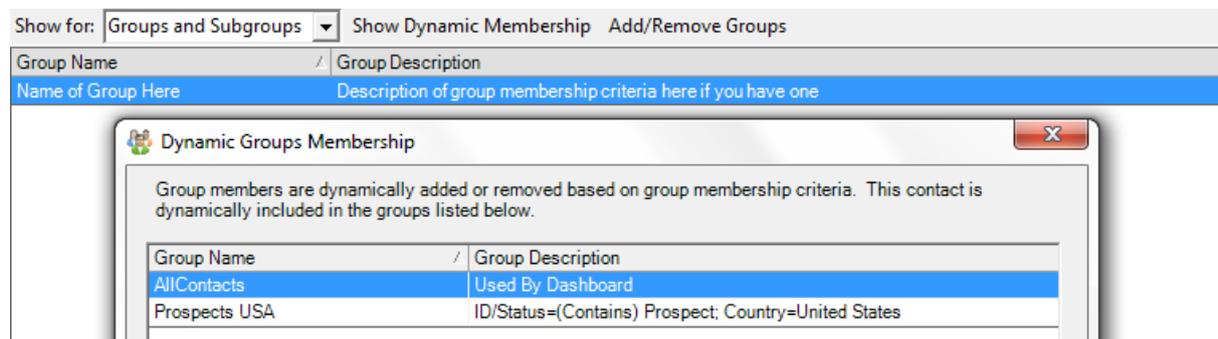
**Trainers best practice tip:** Make sure that if your field value is in a multi select drop down or the value that you are looking for is a part value then you must use a contains operator rather than starts with to ensure you pick up the correct data. For more help on really advanced searches we are always available to help or pick up our help sheet on this topic.

### Viewing a contacts dynamic group membership from the contact record

You will never have to set the membership for any contact that is populating a dynamic group on a manual basis. The value in the field of the advanced search rule use will state whether the contact belongs in a group or not. You can however view which dynamic groups a contact belongs to at any time. From the main contact screen, select the Group tab and then select the **Show Dynamic Membership** option:



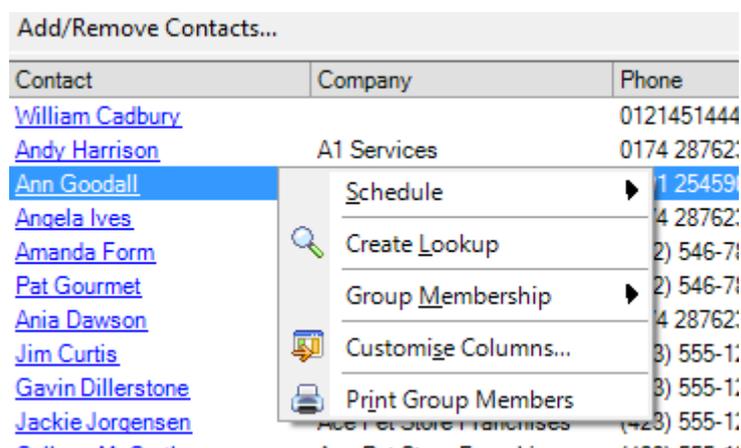
A list of the dynamic groups that the contact belongs to will display on screen:



If you would like to test the dynamic group to ensure it is populating correctly, change a value in a field on one record card so that it does not match the search criteria and revisit the above screen. You will see the contact has been automatically removed from the group. Make sure you change the criteria back to the correct value if you do test this before you leave the contact record.

### Activating a list of group members as a contact list on screen

The main point of creating group is that you can go back to and work with your group at any time. If you would like to create a lookup of your group members either for a report, to print labels, or to simply view as a list follow the next process. Go to the group screen and highlight your group, as soon as it is active the contacts will automatically appear under the contacts tab, this is true whether the group is static or dynamic. Using the right click function, click anywhere on the right hand pane straight over the list of contacts:

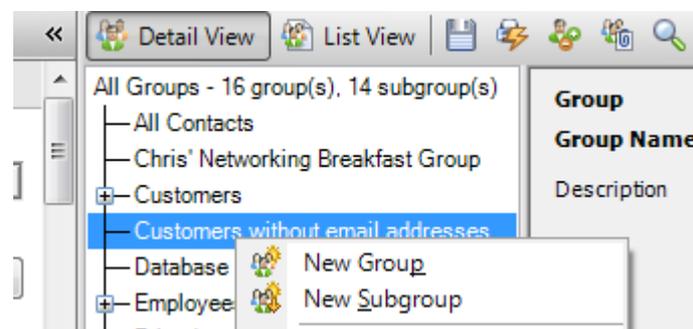


This will take you back to the main contact list view and ACT! will produce a lookup of the group members displaying them in the contact list.

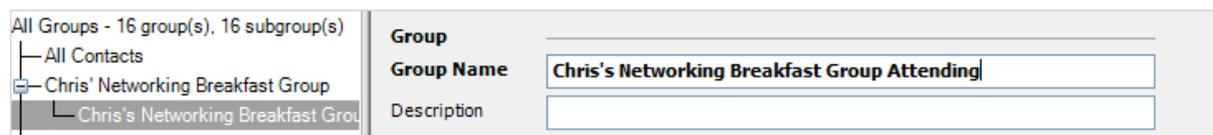
### Creating sub groups in ACT!

Sub groups are an excellent way of holding sub-sets of data together as a slice or sub section of the main group. Group and sub group structures work similar to folder structures in explorer so it is important that you structure the names of them in a consistent format. You can, if required have sub groups of sub groups too and create an entire filing structure, but remember the lower the sections go the harder they are to report on later.

To create a sub group, return to the group screen and highlight the group that you wish to work with. Once it is highlighted, right click the mouse and select new sub group. Make sure that you retain the naming convention of the original group for search and reporting purposes later:

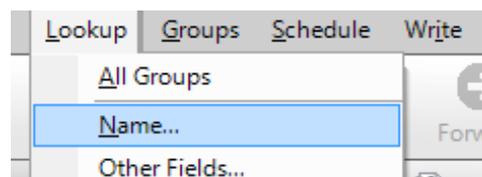


Give the sub group a new name and it will appear underneath the main group that it is a sub-set of, the rest of the functionality relating to working with groups works in exactly the same way as it does for the main groups as outlined above.

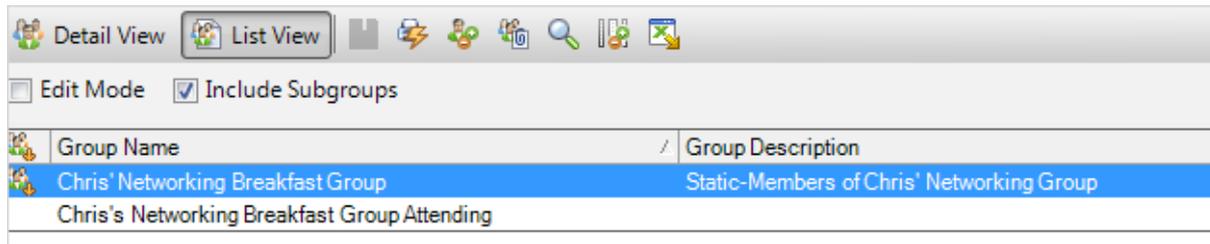


### Creating searches within groups

It is also possible to create searches within the group entity, and these searches will always work much more effectively if group naming conventions are meaningful and consistent. To carry out a search firstly activate the group screen. The following example will look at running a search on the group name. From the main menu line, select Lookup Name:



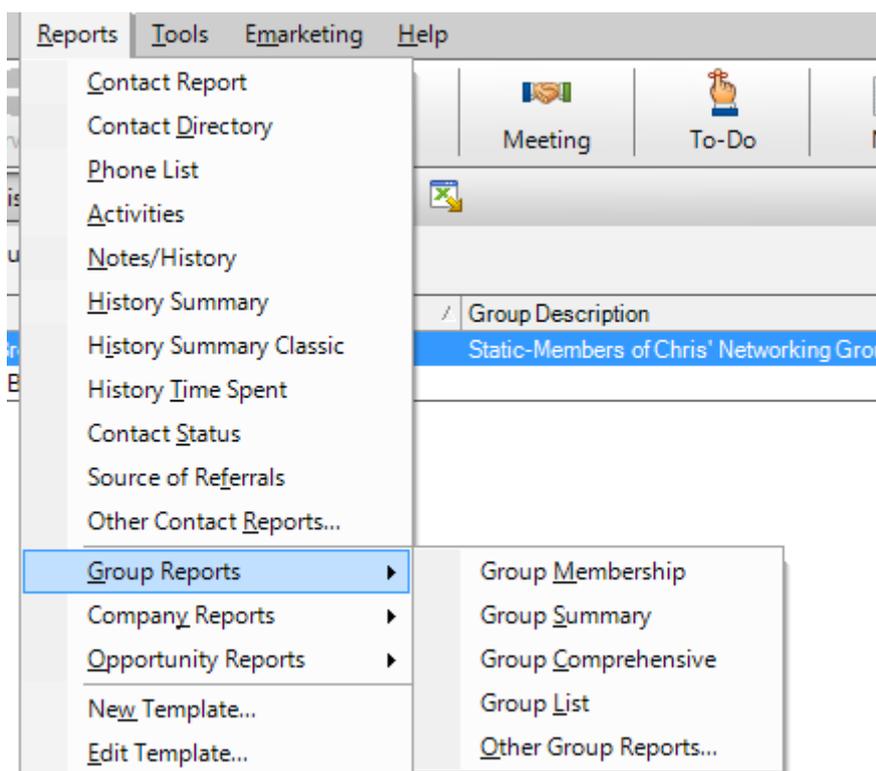
This will pick up any groups and more importantly any sub groups with the value that you type. ACT! will give you a result of the groups found in a list view allowing you to see the groups found and their structure:



If the sub groups are not displaying, make sure you have the subgroups option ticked. This list view gives an excellent overview of the group structures you are currently holding in ACT!

### Running a group report

Before running a report it is important that you get the group lookup correct as described in the section above. We are using the group membership report as an example in this section of the courseware, just because it is our favourite report relating to this topic. Activate your group lookup as described in the previous chapter, and then from the top menu line, select **Reports > Group Reports** and then **Group Membership Report**:



Next, make sure that you run the group to the current lookup, and if you would like to check the report first, select the Preview option:

**Define Filters**

**General**

Send the report output to:

Use data managed by:  
 All users  
 Selected users:

Create report for:  
 Current Group  
 Current Lookup  
 All Groups

Include All Sub-Groups for selected Groups

Select Ok to run the report. ACT! will generate a full report displaying the group and sub group members.

<b>Group Membership</b>					
					Chris Huffman, CH TechONE 13 East 54th St. Suite 300  New York NY 10008
Chris' Networking Breakfast Group					
Contact	Company	Title	Phone	Ext.	E-mail
Elaine R. Braddock	Green Plastics	VP Marketing	310-987-4500		ebraddock@greenplasticsco.email
Jackie Jorgensen	Ace Pet Store Franchises	Proprietor	(423) 555-1221		JJ@acepetfranchises.email
Anabeth Koler	Parsley Group		(602) 981-0000		
Rich Making	Making Technology Co	Founder;President	(877) 661-5200		dmaking@makingtechco.email
Lance Parker	Yellow Jersey Bikes	Owner	(619) 555-8893		lance@yjbikes.email
Rose Sayer	River Rat Tours	President	225-225-2250		rose@riverrattours.email
Buck Turgidson	Mandrake Think Tank	VP Operations USA	202-569-3400		turgidson@MandrakeThinkTank.email
Kirby York	Duke Industries		310-622-1506		kirby.york@dukeindustry.email
Chris's Networking Breakfast Group Attending					
Contact	Company	Title	Phone	Ext.	E-mail
Jackie Jorgensen	Ace Pet Store Franchises	Proprietor	(423) 555-1221		JJ@acepetfranchises.email
Rich Making	Making Technology Co	Founder;President	(877) 661-5200		dmaking@makingtechco.email
Rose Sayer	River Rat Tours	President	225-225-2250		rose@riverrattours.email

Once you are happy with the group report, print it save it or close the preview box and run it again to the required output.

### Group realignment

There are two ways of realigning a group. Firstly if you want to change the way your group list is structured, simply change the name of the group. To do this simply click on it to select it and then overtype the name in the group name box. On save this will move the group alphabetically to its new location in the list.

There may be occasions when you create a sub group under the wrong group, if this is the case you will need to move it back to its correct location, in other cases you may just want to move the group somewhere else. To do this highlight the group or subgroup wherever it is in the list and simply drag it to its new location. Exactly the same as you would move a folder in windows explorer, ACT! will confirm the new location is correct click ok to accept the move.